



Tax Form Checklist

Checklist



Check the checkbox with a when a task is completed.

Personal Information

Your social security number, DOB
 Your spouse's full name, DOB and social security number
 Drivers License (Issue & Expiration Dates)

Dependent(S) Information

Dates of birth and social security numbers
 Childcare records
 Income of other adults in your home

Sources Of Income

Employed - Forms W-2

Unemployed - Unemployment, state tax refund (1099-G)

Self-Employed

- o Forms 1099-MISC, Schedules K-1, income records to verify amounts not reported on 1099s
- o Records of all expenses — check registers or credit card statements, and receipts
- o Business-use asset information (cost, date placed in service, etc.) for depreciation
- o Office in home information, if applicable (square footage of space used)
- o Record of estimated tax payments made (Form 1040ES)

Rental Income

- o Records of income and expenses
- o Rental asset information (cost, date placed in service, etc.) for depreciation
- o Record of estimated tax payments made (Form 1040ES)

Retirement Income

- o Pension/IRA/annuity income (1099-R)
- o Traditional IRA basis (i.e. amounts you contributed to the IRA that were already taxed)
- o Social security/RRB income (1099-SSA, RRB-1099)

Types Of Deductions

- Home Ownership
- Charitable Donations
- Medical Expenses
- Health Insurance
- Childcare Expenses
- Educational Expenses
- Job Expenses & Tax Prep Fees
- State & Local Taxes or Sales Tax
- Retirement & Other Savings
- Federally Declared Disaster

Direct Deposit

Bank account number and routing number, if depositing your refund directly into your account